Wealth Enhancement®



# *Life By Design: A Guide*

A Guided Journey Through Discovering, Designing, and Living the Life You Deserve

*The Massimo-Anastasian Team*

# *Welcome*

Dear Reader,

Welcome. We're so glad you're here.

At the Massimo-Anastasian Team, we believe that true wealth begins with intentional living. Our ***Life by Design*** model was created for women like you—intelligent, discerning, and ready to elevate every chapter of life with clarity, confidence, and grace.

Too often, financial planning focuses solely on the numbers. But we believe that **you are the blueprint**. The most powerful financial strategies start with your vision, your values, and your personal definition of success.

*Advisory services offered through Wealth Enhancement Advisory Services, LLC, a registered investment advisor.*

# *Overview*

Here, you'll walk through our signature three-step approach:

1. **Discover** what matters most
2. **Design** your plan around it
3. **Live it** with freedom and ease

Throughout these pages, you'll find meaningful reflection prompts, actionable insights, and real-life stories of women who've embraced this model to transform their lives—not just financially, but holistically.

Take your time. Let this guide be a space of possibility. Whether you're navigating a life transition or simply craving more intentionality, this is your initiation to lead with purpose and let your wealth follow.

With warmth and admiration,

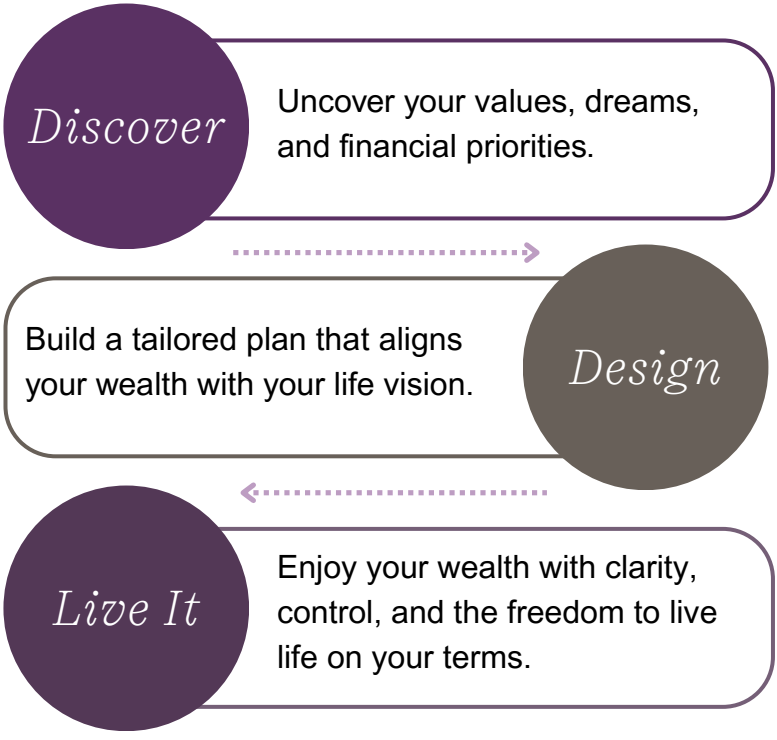
*The Massimo-Anastasian Team*

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Clarity
Begins
With
You

# *Our Three Step Process*

Your journey is unique—but you don't have to navigate it alone. Our ***Life by Design*** model gives you a clear, elegant path.




Your
Truth
Unveils
Brilliance

# *Uncover What Matters Most*

Before numbers, come values. The **Discover** reveals what truly inspires, energizes, and fulfills you.

Through thoughtful reflection, we illuminate the principles that will guide every decision moving forward.



***Your wealth should reflect who you are, not just what you have—and that clarity begins here.***

*Discover* | *Design* | *Live It*

# *Your Values, Your Compass*

Before designing the life you desire, you must first understand the values that guide you. This reflection will uncover what truly drives your decisions and shapes your vision for the future.

*"When I think about the legacy I want to leave, what words come to mind?"*

# *Intuition to Intention*

## How We Support Your Discovery Process

Uncovering your values isn't something you have to do alone. In our client relationships, we guide with care and precision:

- **Our Life by Design Values Card Deck**: A powerful exercise that brings subconscious priorities to the surface.
- **One-on-One Reflective Discovery Sessions**: Facilitated conversations that go beyond surface-level goals.
- **Visioning Tools & Lifestyle Mapping**: Our proprietary process that reveals what your ideal day, year, and legacy truly look like.

*Discover* | *Design* | *Live It*

# *The Art of Self-Knowing*

True discovery requires honesty. By acknowledging where your life feels aligned and where it does not, you create space for growth, clarity, and intentional change.

*“How aligned is my current life with my deepest values?”*

# *From Knowing to Becoming*

The **Discover** phase is the foundation for everything that follows. In a matter of conversations, you'll gain rare insight into what matters most and a vision for the life you truly want to live.



***Your clarity becomes our blueprint. Ready to discover what's possible?***

*Discover* | *Design* | *Live It*


Elegance
Flows
From
Intention

# *Where Vision Becomes Reality*

The **Design** phase transforms your vision into an actionable, customized financial strategy. Together, we align your wealth with your values, ensuring every decision supports the lifestyle and legacy you've imagined.



***"When vision is shaped with intention, every detail serves your greater purpose."***

*Discover | Design | Live It*

# *Luxury Lives in Intention*

Your vision now takes shape. By blending your values with strategic planning, we craft a lifestyle blueprint that aligns your financial world with the life you've imagined.

*"If I could design my perfect day, week, and year, what would it look like?"*

# *Blueprint to Brilliance*

## How We Support Your Design Process

We use refined, proven frameworks to ensure your vision translates seamlessly into action:

- **Life by Design Budget Sheet:** More than numbers—includes monthly reflection prompts to track both spending and emotional alignment, helping to identify patterns, gaps, and moments of joy.
- **Values-Based Spending Framework:** Categorizes expenses into Essential, Discretionary, and Luxury & Legacy, encouraging guilt-free spending that reflects your priorities.
- **Quarterly Lifestyle Review:** Ensures your money, values, and life goals remain in perfect alignment through regular, intentional check-ins.

# *Crafting a Vision That Lasts*

Design is more than a moment—it is the creation of a sustainable lifestyle that reflects your vision now and adapts with you in the years ahead.

*"What changes would bring my life closer to the one I've envisioned?"*

# *This is Where it All Comes Together*

This is the moment your aspirations take shape. We craft a bespoke plan that balances opportunity with preservation and precision with possibility.



***Your vision deserves a plan designed with precision—let's create yours.***

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Abundance
Blooms
Through
Alignment

# *The Art of Living Well*

The Life by Design journey doesn't end with a plan—it flourishes when you live it. The **Live It** phase is about fully embodying the life you've envisioned, aligning your choices, time, and resources with what matters most.



***"When life aligns with purpose, every moment becomes a masterpiece."***

*Discover | Design | Live It*

# *The Life You Imagined, Realized*

## How We Support Your Live It Process

Ongoing support ensures your plan evolves with you.

- **Regular Strategy Sessions:** Refine and adjust as life changes.
- **Portfolio & Lifestyle Check-Ins:** Confirm your wealth continues to serve your vision.
- **Legacy in Action Planning:** Bring your giving, family, and impact goals to life.

# *Abundance in Every Moment*

Living your design is about alignment—ensuring your daily choices, investments, and experiences reflect the vision you've created. It's where confidence and fulfillment meet.

*"What steps can I take this year to live more intentionally?"*

# *Living It, Three Ways*

The Live It phase looks different for every woman, but the heart of it is always the same: a life that reflects her deepest values, supported by a plan that evolves with her.

Here are three stories of women who stepped into their next chapter with clarity, confidence, and purpose:

1. **The Vibrant Retiree**
2. **The Newly Independent Divorcee**
3. **The Burnt-Out Business Owner**

*Which story could be yours?*

# *A Story of Alignment*

## Dr. Elaine, 66



Dr. Elaine, a celebrated surgeon, spent decades caring for everyone but herself. In retirement she wondered, "How *do I give myself permission to truly live?*

Through our ***Life by Design*** process, Elaine clarified what mattered most—mentoring women in medicine, annual European travel, caring for family, and creating a sunlit retreat for her grandchildren. Today, she lives generously and joyfully, with confidence and ease.

***"Now I see my wealth as a tool to live meaningfully while I'm here to enjoy it."***

***-Dr. Elaine S.***

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*This is a hypothetical story and not reflective of any individual client's experience. This information is not intended as a recommendation. Investment decisions should always be made based on an investor's specific circumstances.*

# *A Story of Realignment*

## Marissa, 42



After a difficult divorce, Marissa felt lost—financially, emotionally, and personally. She feared starting over, unsure what her future could look like.

Through our ***Life by Design*** process, Marissa rebuilt her confidence, gained financial clarity, and envisioned a life filled with freedom and purpose. She now runs a passion-based business, travels with her daughters, and no longer second-guesses her financial choices.

***"I thought I was starting from scratch. But I was actually building something better—just for me."***

***-Marissa L.***

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# *A Story of Renewal*

## Talia, 53



After years of building a successful business, Talia looked around and realized she was burnt out—mentally, emotionally, and physically. She had achieved what she thought she wanted, but something was missing: space, creativity, and peace.

Through our ***Life by Design*** process, Talia redefined what success looked like. She created a financial plan that supported a sabbatical, made space for rest and reflection, and ultimately led her to design a more intentional career path.

***"I didn't need to push harder—I needed to realign. Now, everything feels more like mine."***
***-Talia M.***

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# *Living in Full Alignment*

The power of this phase lies in the everyday moments. By aligning your actions, mindset, and resources, you ensure that your dream life is not just imagined—it's lived.

*"What does living fully look like for me right now?"*

# *Your Life, By Design*

From the moment you uncover what matters most, to shaping a plan that reflects your deepest values, to living that plan with intention —this is the journey we walk together.

The ***Life by Design*** process is more than financial planning. It's about creating the freedom, confidence, and alignment to live fully —on your terms.

Thank you for taking the time to explore this guide. Our hope is that it has sparked reflection, inspiration, and a vision for what's possible when you lead with your values.

# *About Our Team*

Led by Charles Massimo and Peter Anastasian, our team brings over 60 years of combined experience helping successful families preserve and grow their wealth across generations.

As part of Wealth Enhancement, a nationwide independent wealth management firm, we offer the strength of a collaborative team supported by deep resources, research, and experience. This allows us to deliver comprehensive, high-touch service backed by a broader team of specialists dedicated to your long-term success.

Our clients benefit from a coordinated team of CFP professionals, CPAs, and planning specialists working together to help you navigate retirement, manage complex wealth, and plan with clarity and confidence.

Whether you're navigating life after a divorce, adjusting to the loss of a spouse, or stepping into a new role as a financial decision-maker, we provide thoughtful guidance through our Life by Design program—helping women gain control, confidence, and clarity around their financial future.

# *Designing Your Next Chapter*

This guide is just the beginning. Your next step is to reflect on what you want your life to feel like—and who you want by your side to help you design it.

We invite you to schedule a private discovery call with our team to explore your own Life by Design. Whether you're curious or ready, this conversation is yours—with no obligation, only insight.

*Let's design something meaningful—together.*


*The Massimo-Anastasian Team*


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